salesforce

Loyalty Management

Build lifetime loyalty through connected and differentiated experiences.

Built on the world's #1 CRM, Loyalty Management gives businesses in any industry the flexibility to configure their loyalty initiatives to fit their business needs. An end-to-end loyalty platform, Loyalty Management empowers organizations to create intelligent, personalized engagements that drive value for the customer and increase customer lifetime value and ROI for the business.

Transform loyalty with the world's #1 CRM.

Flexible, End-to-End Platform

Configure Programs to Fit Your Needs
Whether you're creating a B2B or B2C program, Loyalty Management gives you complete flexibility in designing programs across any industry.

Built on the Trusted Salesforce Platform
Rest assured that your loyalty platform will be able to scale with your business as your needs change over time.

Manage Your Programs from Beginning to End
Loyalty Management UI makes it easy to set up programs, tiers, currencies, and benefits with no code.

Accelerate Time to Value for the Business and Customers

Get to Market Quickly
Launch your program faster than a custom build with Loyalty Management's underlying infrastructure and industry templates, reducing your time to value.

Future-Proof Your Loyalty Program
With the flexibility of the Salesforce Platform, you can test, learn and iterate to stay ahead of changing consumer demands.

Ensure You're Generating Value for Your Business
Drive program success by tracking ROI for your program and promotions through real-time and predictive analytics.

Deliver an Integrated Loyalty Experience

Create a Connected Program with an Integration-Ready Platform
Leverage out-of-the-box integrations to the Salesforce ecosystem and integration-ready APIs to connect Loyalty Management to your tech stack.

Increase Program Stickiness
Infuse loyalty across the entire customer experience, making customers feel understood and valued across marketing emails, service calls, and frontline staff interactions.

Diversify Benefits, Promotions, and Rewards
Use Benefits Management to trigger benefits outside of Loyalty Management and leverage your partner network to create a wide range of earn and redemption options.

Generate a Single Source of Truth

Unify Customer Data for a 360-Degree Member View
Get a holistic view of your relationship with your customers through integrations that combine loyalty member data with other customer data.

Deliver Personalization at Scale
Better target your members with more personalized loyalty engagements that deliver value for members and your business.

Activate Your Members Across the Business
Leverage Loyalty Management data across your business to better inform operations across sales, service, marketing and front- line staff.

Loyalty Management Features and Benefits

Program Setup

Set up B2B and B2C programs in any industry. An intuitive UI makes it easy to set up tiers, define currencies and benefits, and establish all other program constructs.

Member Administration

Aggregate information for a 360-degree view of member details and loyalty activities. Enable admin actions, such as point adjustments, on individuals or in bulk.

Pooled Member Profiles

Incentivize customers to earn more by allowing multiple members in households and organizations to pool their points in a single account.

Partner Administration

Drive greater program value, onboard cross-industry partners, and manage agreement terms for member rewards and redemptions.

Rewards Management

Rapidly deploy loyalty rules for accruals and redemptions based on member activities. Define and track member behaviors aligned to program objectives.

Points Escrow Account

Protect your business against fraud by storing member points in an escrow account for the duration of your return period.

Benefits Management

Automatically trigger actions in the Salesforce ecosystem such as service entitlements or vouchers, or push these benefits to other systems to create a connected customer experience.

Dynamic Promotions Management

Manage personalized, time-based promotions for targeted segments. Easily set up promotion rules for behavioral and experiential offers and deliver through your customer's preferred channel.

Voucher Management

Set up vouchers for discounts and product or service experiences to reward eligible behaviors, or to surprise and delight. Track redemptions and query vouchers from third-party systems.

Salesforce Ecosystem Integrations

Create a seamless loyalty experience with integrations to Salesforce CDP, and Sales Cloud, Service Cloud, Commerce and Marketing Clouds, including Email Studio, Interaction Studio, and Journey Builder.

Industry Templates

Get to market faster with reference implementations that are relevant to your industry. Leverage industry-specific data models and processes to quickly implement Loyalty Management.
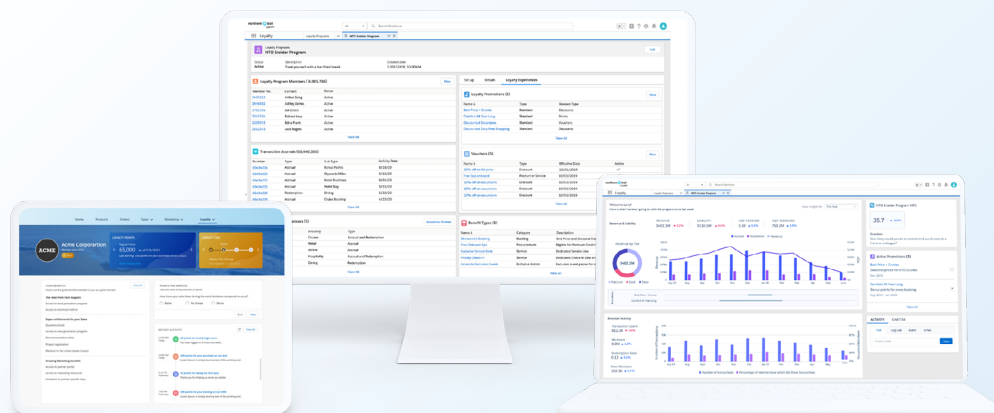
Loyalty Management APIs for External Integrations

Connect any of your existing systems to Loyalty Management using extensible, integration-ready APIs.

Tableau CRM for Loyalty Management*

Aggregate rich, actionable insights across your program members, and partners through integrated dashboards. Leverage predictive analytics across engagement, liability, and revenue to drive program ROI.

* Requires additional license.